Federal Acquisition Service

Quote

GSA Training Module Developed for IWAC RBA Extension Project

Quote Training Module Overview

Description: This training module will take you step-by-step through the Quote document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component as well as the integrated RBA & e-Buy Quote submission Process.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the "Backspace" key to go back. If the tutorial opens in the PowerPoint application, click on "F5" to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the "Backspace" key.

Quote Glossary

Term	Definition
Quote	Document that Contractors Submit in ITSS (or in e-Buy) to respond to an RFQ or RFI, detailing how they will meet the requirements set forth by the client. A Contract Number must be selected on every Quote.
Contractor	Employee of a private company, or industry partner. Contractors submit quotes for RFQs/RFIs, and once awarded, create support documents. Also known as a vendor.
Contract	The government contract number that the order will use if awarded.
Total quote $	Sum of all Task Item Quote Amount values.
Unregistered Vendor Quotes Summary	ITSS page that is generated after RFQ process is closed on an e-Buy published RFQ. Lists quote information submitted by Contractors who weren't registered in ITSS at the time the RFQ was closed.

Quote Privileges

user Role | Action	Create	Edit	View
GSA users	✓	✓	✓*
Clients			✓**
Contractors	✓***	✓***	✓
e-Buy Import	✓		

*Can be limited to only GSA users in the region or listed on the COI

**Can limit Client to 'Show All', 'Show None' or 'Only Show Winner'

***Can create or edit during open non e-Buy RFQ period Only

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| WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS |

Select a View:

<<-- View Orders -->> | <<-- View Inactive Orders -->> | <<-- View Action Items -->> | <<-- View Support Information -->>

Go to a Specific View Item: [_____] [Go]   Create New Order

Orders - Entire Package

Next -> |

▼ Order Package
  ▼ ID31120060-COI Sarah Client (Organization Name) AWARDED>>Furniture procurement
      00 Chronology
    ▶ 01 Electronic Contract File (ECF)
    ▼ 01 BOM/SOW ID31120060 - 000 Amendment 00 AWARDED
      ▼ RFQ Modification 000 Version 00 Amendment 00 GSA APPROVED
          Quote Ver 00 Rev 00 for Steve Contractor (IT INDUSTRY PARTNERS) Cnt# << Open Market >>, BID=$200,000.00
          Quote Ver 00 Rev 00 for Mary Contractor (CONTRACTOR COMPANY) Cnt# << Open Market >>, BID=$235,000.00
          *Market Analysis Version 00 - Quote Selected: Steve Contractor - IT INDUSTRY PARTNERS (<< Open Market >>), $193,100
          >Certification of Funds - Funds Available (Francine FM)
          >Form 300 - Awarded on 2012-02-09
          >FPDS-NG Form - ID31120060-000

Click on the Quote links in the Order Package View to open an existing Quote in view mode

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Within the Pre-Award Workflow Context
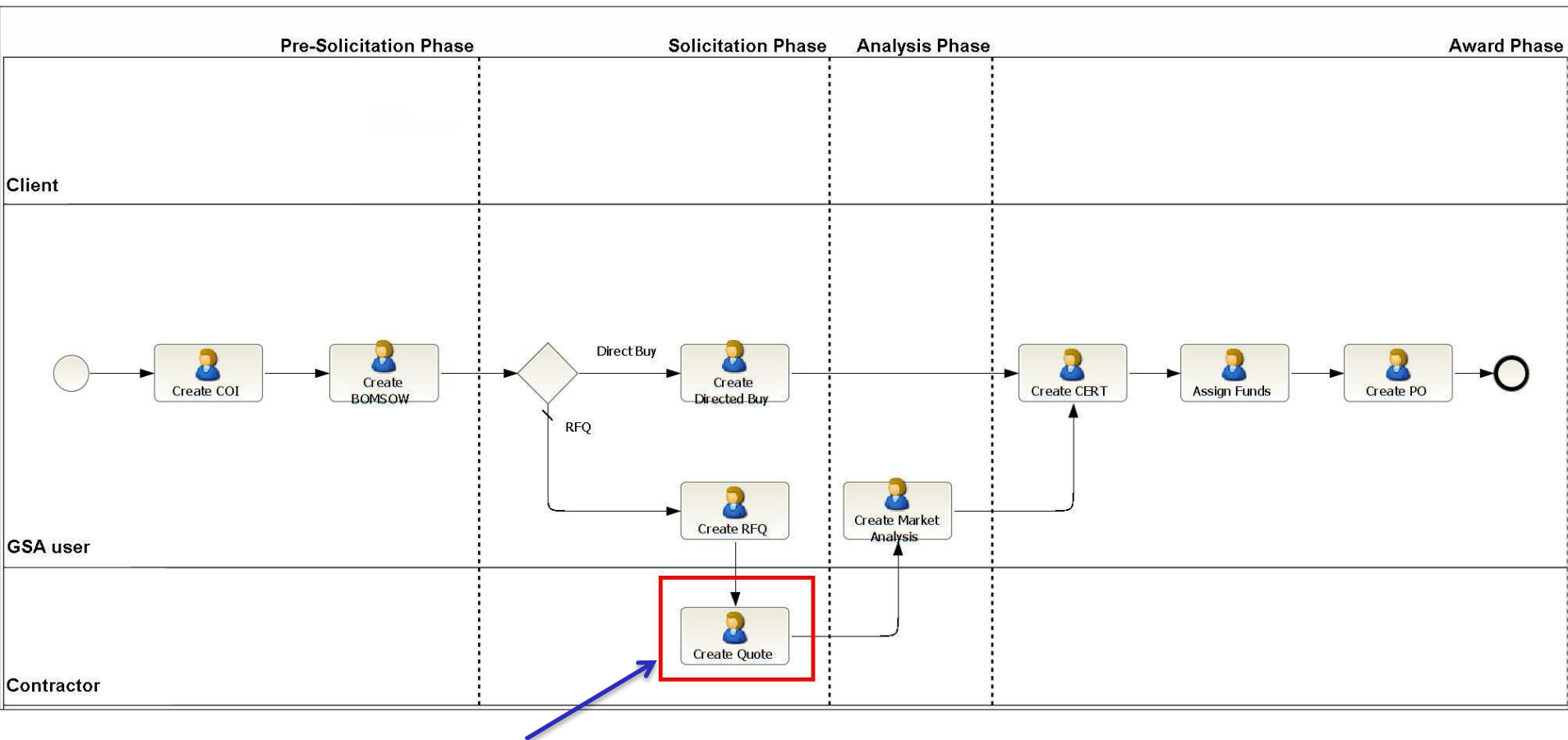
Contractors submit quotes in either ITSS or e-Buy depending on where the RFQ was published

RBA & e-Buy Solicitation Process
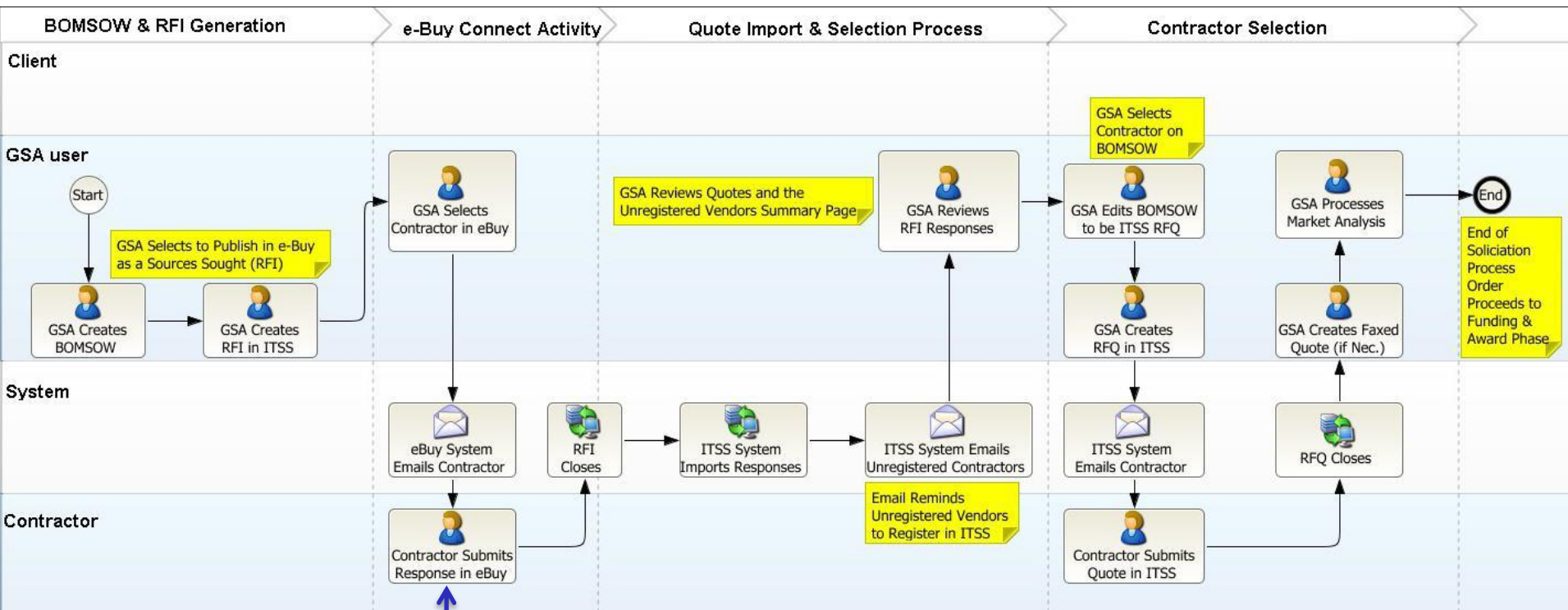
Contractor creates a Quote in e-Buy and enters a quote amount for each task item. A dollar amount is not required for a response to an RFI.

The Unit Price field in e-Buy maps to the Task Item Quote Amount field in ITSS

If the contractor submits a quote in e-Buy and they are not registered in the RBA, their quote *data* will be transmitted back to ITSS and displayed within a Quote Summary page

If the contractor submits a quote in e-Buy then they will be displayed an e-Buy Quote confirmation

GSA eBuy

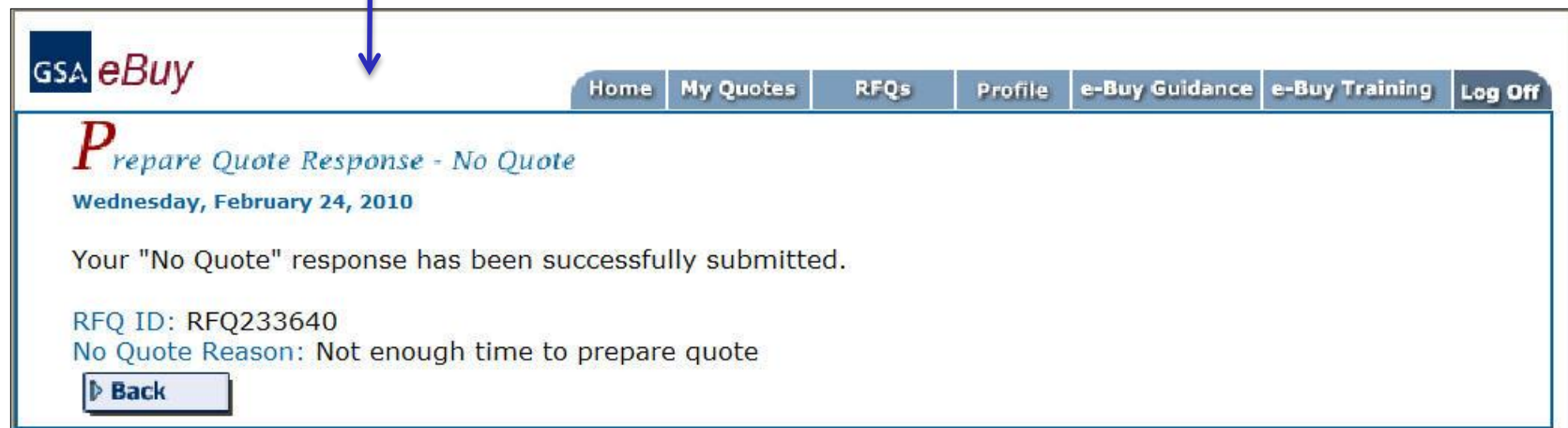| Home | My Quotes | RFQs | Profile | e-Buy Guidance | e-Buy Training | Log Off |

*P*repare Quote Response

Quote **RFQ236230-HKR** has been Submitted.

Thank you for your Quote. You should receive an e-mail notice as to whether your quote was awarded or not awarded (if your e-mail notifications are turned on, see Profile). Please contact the buyer directly if you do not receive a reply within 15 days after RFQ has closed.

Go to **My Quotes** to view all of your quotes

If the contractor submits a No Quote in e-Buy they will pick a reason and then they will be displayed an e-Buy No Quote confirmation

GSA eBuy

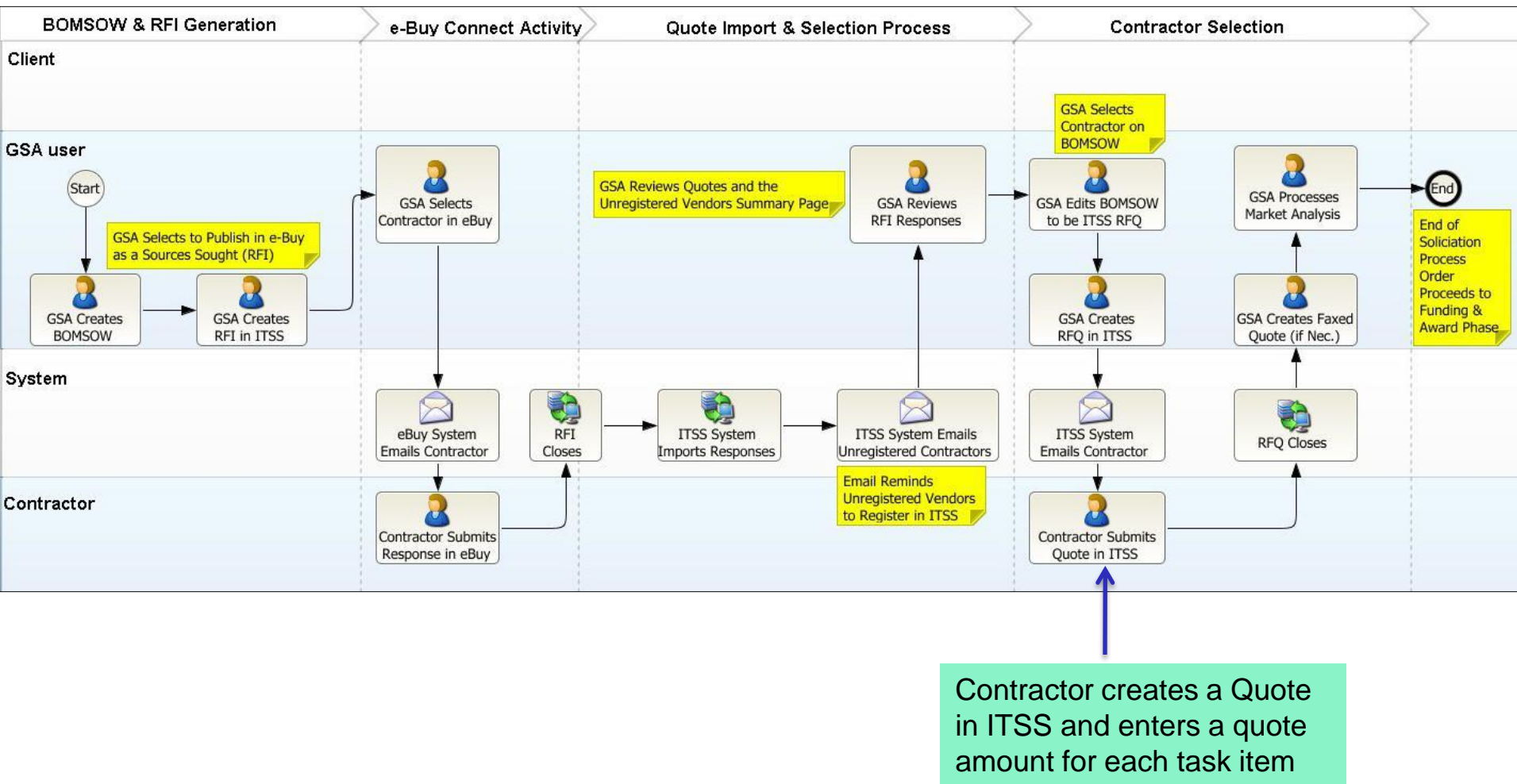| Home | My Quotes | RFQs | Profile | e-Buy Guidance | e-Buy Training | Log Off |

*P*repare Quote Response - No Quote
Wednesday, February 24, 2010

Your "No Quote" response has been successfully submitted.

RFQ ID: RFQ233640
No Quote Reason: Not enough time to prepare quote

▷ Back

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RBA & e-Buy Solicitation Process

Contractor creates a Quote in ITSS and enters a quote amount for each task item

Creating a Quote in ITSS

RFQ link is displayed for the selected Contractors in the ITSS Action Items

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WELCOME | **ORDERS** | **REGISTRATION**

Request for Quote

[Create Quote] [Go To Order Package]

Submitted By: Christopher CSR on 02/09/2012
Order ID: ID31120049, Mod 000, Version 01, Amendment 00
Client Rep: Sarah Client (Organization Name)
Status: Quotes Requested

Contractor can click the Create Quote button on a non e-Buy RFQ that is in an open state

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Quote

[Close Without Saving]

👉 All Fields marked with 🟠 are required.

Submitted By: Steve Contractor at 02/09/2012
Contractor: Steve Contractor (IT INDUSTRY PARTNERS) under

🟠 [<< Select >> ▼]

<< Select >>
<< Pending Approval >>
<< Open Market >>

Number that this Quote is Submitted UNDER in the field above

Select a contract number or Open Market

Alternate(s):
Phone Number: (619) 555-0100   Extension: [   ]

Order ID: ID31120049, Mod 000, Version 01, Revision 00

Quote Due: 02/09/2012 01:45 PM EST
Quote Body:

Text

Type a quote body and/or attach a file

🟠 **AND/OR** - To complete the Quote, you must enter in either an Quote Body (above) or attach one or more requirements document(s)(below). You may use both - one is required.

File Attachments:

📌 Attach Files

🟠 **I will meet or exceed all requirements:** ○ Yes ◉ No

🟠 **I will meet or exceed desired delivery dates:** ○ Yes ◉ No

File attachments have a maximum size limit of 50 MB per file.
File attachments must have a unique filename within the entire order.

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Users must indicate a Task Item Quote Amount for each task item regardless of whether it is active or inactive

Comments:

Task Items: 🟡

Fiscal Task Type ⇕	Item No. ⇕	Description ⇕	POP From Date ⇕	POP To Date ⇕	Delivery Date ⇕	Task Item Quote Amount ⇕
COM	0001	Furniture	n/a	n/a	02/14/2012	$100,000.00
COM	0002	Seating	n/a	n/a	02/21/2012	$50,000.00
FFP	0003	Installation	02/15/2012	02/29/2012	n/a	$50,000.00

Total Quote $s: To Calculate **Total Quote $s**, Click here >> `Calculate` $200,000.00

Contractor Access List: <<Select Access Rights>>

Click *No Bid* if Quote submission is not desired

Total Quote $ is calculated as the sum of all *Task Item Quote Amount* values

[No Bid] [Submit] [Close Without Saving]

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RBA & e-Buy Solicitation Process

A *Quote Summary for Unregistered Contractors* document is created and added to the *Order Package* if the e-Buy Quote Import imported quotes submitted by contractors that were not registered in the RBA
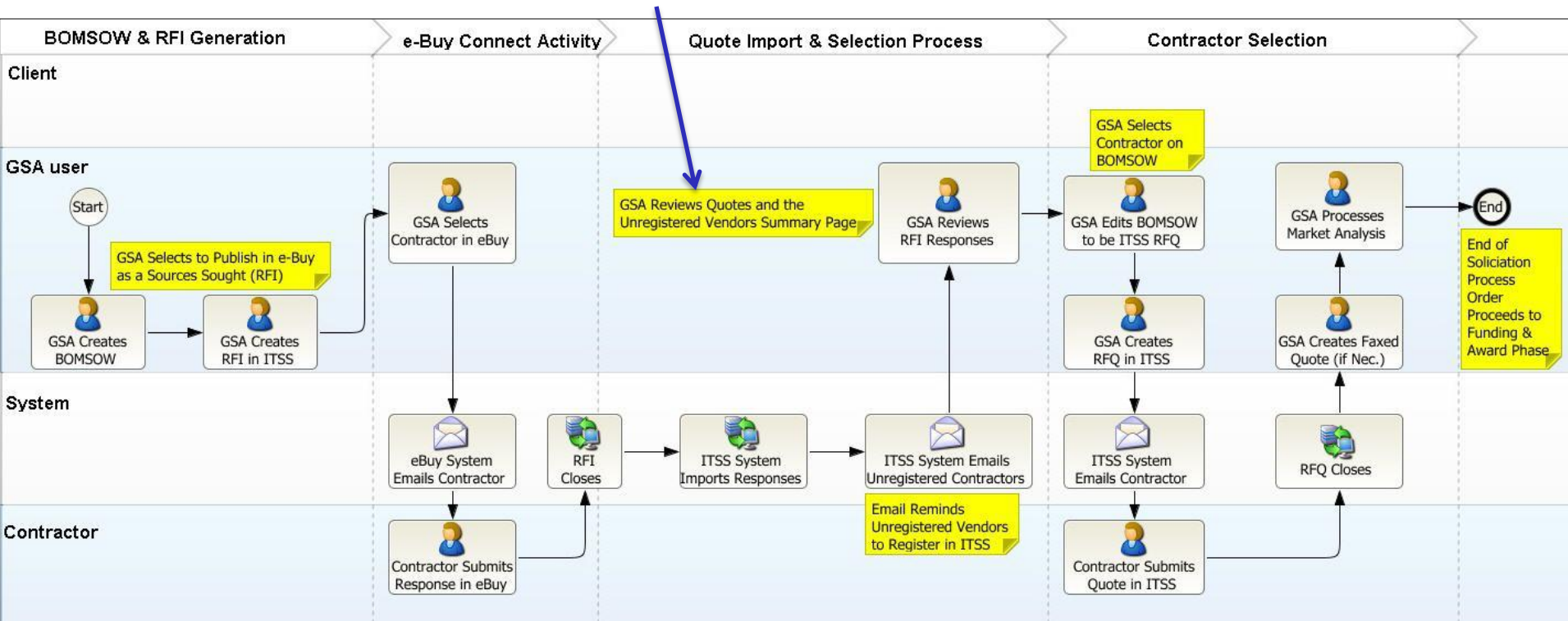
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Select a View:

| <<-- View Orders -->> | ▼ | <<-- View Inactive Orders -->> | ▼ | <<-- View Action Items -->> ▼ | <<-- View Support Information -->> ▼ |

Go to a Specific View Item: [＿＿＿＿＿] [Go] Create New Order

Orders - Entire Package

Next -> |

▼ Order Package

  ▼ R7EBUYTRN1A-COI A. Duke (Test TrainInfantry School) Quote Selected>>training in e-buy

    00 Chronology

    ▼ 01 BOM/SOW R7EBUYTRN1A - 00 Amendment 00 ANALYSIS COMPLETE

      ▼ RFQ Modification 00 Amendment 00 Revision 00 GSA APPROVED

        Quote Amd 00 Rev 00 for Stanley Macker (ROBCO CORP.) Cnt# GS-10F-0246L, BID=$10,000.00

        Quote Amd 00 Rev 00 for Sharon F. Smithers (ABC ASSOCIATES INC.) Cnt# GS-10F-0086K, BID=$10,000.00

        Unregistered Vendor Quotes Summary ◄————————

        *Market Analysis Amendment 00 - Quote Selected: Stanley Macker- ROBCO CORP. (GS-10F-0246L), $10,300.00

        >Certification of Funds has been sent to FM at ITOMS

Click on the Unregistered Vendor Quotes Summary link in the Order Package View to see quote information from unregistered contractors that submitted quotes via e-Buy

Quote Summary for Unregistered Contractors Page Privileges

user Role | Action	Create	Edit	View
GSA user			✓
Client			✓
Contractor			
e-Buy Import	✓		

Information about each Quote submitted in e-Buy by non-registered contractors is displayed in a table for analysis.

If you wish to select an unregistered contractor's quote then:
1. Register the contractor in the RBA
2. Create a Quote for them

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Quote Summary for Unregistered Contractors

Go To Order Package

Quotes

	e-Buy Quote Id	Date Received	Contractor (Company)	Duns Number	E-mail Address	Total Price	Comments	Attachments
▼	RFQ233681-AZV	03/01/2010	Ebuy Tester (3H Technology LLC)	GS-10F-0095S 969430164	nobody_tftester@hotmail.com_nowhere_nowhere 1234567890	$90.00		

Type	Item No.	Description ⬧	POP From Date ⬧	POP To Date ⬧	Delivery Date ⬧	Task Item Quote Amount ⬧
COM	001	TEST TASK ITEM DESCRIPTION	n/a	n/a	03/26/2010	$20.00
LAB	002	TEST TASK ITEM DESCRIPTION	03/26/2010	04/25/2010	n/a	$30.00
FFP	003	TEST TASK ITEM DESCRIPTION	04/25/2010	05/25/2010	n/a	$40.00

Task Item Quote Amounts are displayed for each Unregistered Contractor that submitted a Quote in e-Buy

	e-Buy Quote Id	Date Received	Contractor (Company)	Duns Number	E-mail Address	Total Price		
▶	RFQ233681-SWJ	03/01/2010	Ebuy Tester (3M Company)	GS-10F-0454M 021873203	ebuyrfq@gsa.gov 1234567890	$120.00		
▶	RFQ233681-MAY	03/01/2010	Ebuy Tester (2020 COMPANY, LLC)	GS-10F-0141S 169810657	nobody_tftester@hotmail.com_nowhere_nowhere 1234567890	$60.00		

No Quotes
-- NONE --

If a GSA user creates a quote for one of the unregistered contractors (after contractor registers in RBA) then the quote is generated with e-Buy task item quote data

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GSA user can create a Faxed Quote on behalf of the Contractor after the RFQ has closed by clicking the **Create Faxed Quote** button on the RFQ
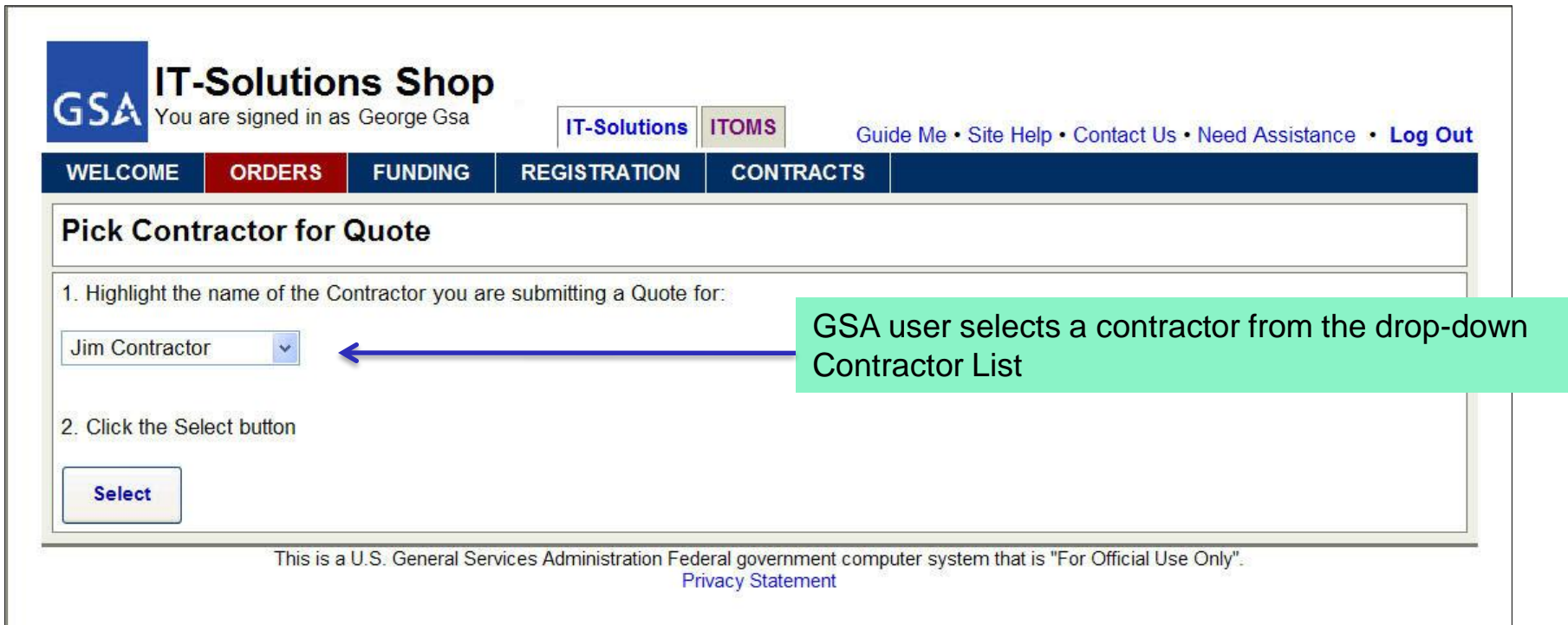
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Request for Quote

| Create Faxed Quote | Market Analysis | Edit | Go To Order Package |

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Pick Contractor for Quote

1. Highlight the name of the Contractor you are submitting a Quote for:

Jim Contractor ▾

GSA user selects a contractor from the drop-down Contractor List

2. Click the Select button

Select

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Quote Status Glossary

Status	Definition
Open	Quote editable and both the 'No Bid' and 'Edit' buttons are displayed.
Closed	Quote no longer editable and only the 'Go to Order Package' button is displayed.

Next Steps…

The RFQ can close for 3 reasons:
1. RFQ closes automatically by system due to close date/time
2. GSA user manually closes RFQ (If non-eBuy)
3. GSA user creates Market Analysis which auto-closes RFQ (cannot occur if RFI)
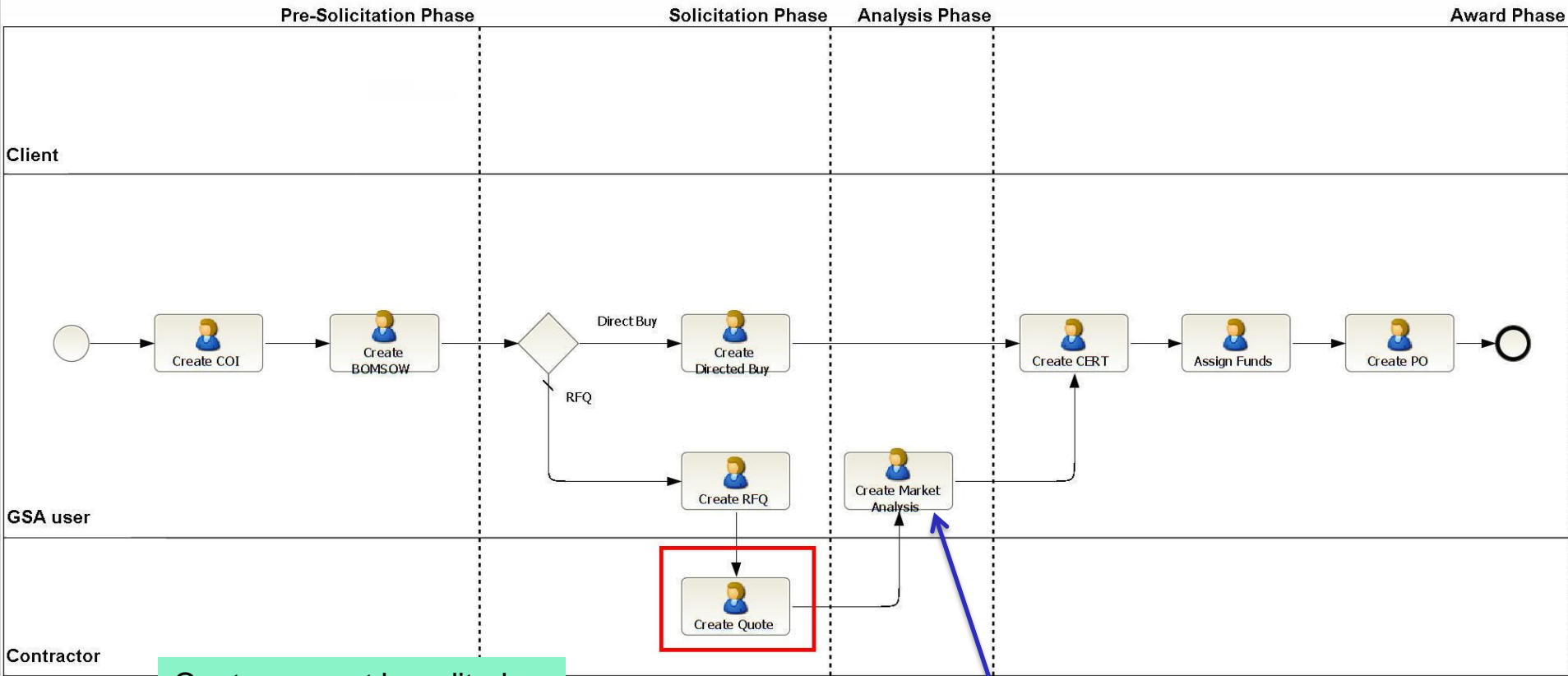
Quotes cannot be edited or submitted by the Contractor if the RFQ Close Date/Time has passed unless the RFQ is reissued

GSA user creates a Market Analysis to evaluate Quotes

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Questions & Support

➤ For questions regarding AAS Policy please contact randy.matlack@gsa.gov or robert.niewood@gsa.gov

➤ For questions regarding the RBA Quote training module please contact RBA Technical Support:

- Phone: (877) 472-4877

- Email: AASBS.helpdesk@gsa.gov